Summary

British Columbia Resident Travel Study

Province of British Columbia
Ministry of Tourism

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SUMMARY OF

THE B.C. RESIDENT TRAVEL ATTITUDE AND MOTIVATION STUDY

Prepared by
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for
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PREFACE

This study was commissioned by the Ministry of Tourism and is published to assist the public and private sectors throughout the Province in tourism development and marketing related activities.

The report is the sole responsibility of the consultant and does not necessarily reflect the opinions of the Provincial Government which funded the study.

SUMMARY OF

THE B.C. RESIDENT TRAVEL

ATTITUDE AND MOTIVATION

STUDY

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SUMMARY OF
THE B.C. RESIDENT TRAVEL
ATTITUDE AND MOTIVATION
STUDY

I INTRODUCTION

In the Fall of 1984 Tourism British Columbia commissioned Marktrend Marketing Research to conduct an extensive survey on B.C. residents' travel patterns within the Province. The primary interest for this survey was to determine where tourism revenue is being spent and what means can be used to increase intra-Provincial travel.

Two types of research were conducted. The first type consisted of five focus groups. The groups were held in Victoria, Prince George, Kamloops, and two in Vancouver (one with males and one with females). Although the results of focus groups cannot be generalized to the population, they do provide valuable qualitative data. The focus groups provided the initial information necessary for developing and refining an extensive telephone survey. Also, the groups provided valuable reactions to proposed and previously shown advertising for travel within B.C.

II RESEARCH OBJECTIVES

The primary objective was to discover where and why B.C. residents are travelling to various destinations. Sub-objectives of the research include:

Objective One: To determine the experience, awareness, motivations, reasons, and prefcrences for travelling within British Columbia, other parts of Canada, the United States, and to other countries of British Columbia residents (ie. those having permanent residence within the Province).

Objective Two: General attitudes towards travel within and outside of British Columbia.

Objective Three: To determine preferences and needs in vacations - The Perfect Holiday.

Objective Four: To measure the penetration of the British Columbia residents' total travel revenues by intra-Provincial vacationing, and to estimate the total potential penetration that could be achieved.

Objective Five: To identify those market segments that are most amenable to travelling within British Columbia, and the support needed to attract these segments.

III RESEARCH METHODOLOGY

a) Focus Groups

To participate in the focus group the following qualifications and quotas were set:

- Over 25 years of age.
- Male or female head of household.
- 2/3 of group have travelled in and out of Province on vacation in last two years.
- 1/3 of group have travelled out of the Province in the last two years.
- None work in the hospitality industry, advertising, or marketing research agencies.
- None have attended another group discussion on any topic during the last year.

b) Telephone Survey

A sample of 634 randomly selected B.C. residents was collected. The sample size allows for generalization of results at a 95% confidence level $\pm$ 4.1%. The sample was distributed across the nine tourism regions in the Province according to the population of each of these areas. The results from the Vancouver and Southwestern B.C. zones are the most accurate and provide projectable data for this area. The results from each of the other areas, although not projectable, are statistically comparable to one another and statistically reliable. The sample base of Vancouver and Southwestern B.C. (which were considered two distinct sampling units) provides a sub-sample with more than adequate tolerances for reliance on the accuracy of the results, to be able to measure resident travel patterns.

Quotas were set for gender and age so as to reflect the population breakdown according to Statistics Canada 1983 update of the 1981 Census. To qualify for the survey the respondent had to be the head of the household, acting as the spokesperson for this unit.

Results of the survey were analyzed, in-house, using the Statistical Package for the Social Sciences (SPSS). These are state-of-the-art in marketing research computer analysis, providing speed, control, and in-depth analysis.

IV OVERALL CONCLUSIONS

The overall conclusions that may be drawn from the research are that British Columbians aren't travelling intra-Provincially as much as they could because:

- A trip within the Province for any longer than three days is less appealing than going to outside areas.

- A two day trip within the Province isn't long enough to achieve the goal of relaxation.

- To British Columbians the Province's main attraction is beautiful scenery, with the other components of the travel experience having much less attraction.

- The costs associated with travel in B.C. are considered to be high and constitute a potential barrier for intra-Provincial tourism.

- B.C. residents awareness of the Province's attractions reduces their interest in re-visiting parts to which they have travelled previously.

V KEY FINDINGS

NOTE: Throughout the summary the BASE refers to the number of respondents who answered the question. In certain cases the total number of responses is given so that the measure of central tendency may be computed.

Objective One: To determine the experience, awareness, motivations, reasons, and preferences for travelling within British Columbia, other parts of Canada, the United States, and to other countries of British Columbia residents (ie. those having permanent residence within the Province).

General Travel Patterns

The average B.C. resident took 2.1 pleasure trips last year. Residents of the B.C. Rockies area tended to be the greatest travellers, while many of those in more isolated areas of the Province took fewer, if any, holidays.

Residence	BASE	Average # Trips Taken in the Past Year	Proportion Not Travelling
			%
British Columbia	634	2.1	22
Vancouver Island	102	2.4	24
G.V.R.D.	200	2.2	23
Southwestern B.C.	26	1.4	23
Okanagan/Similkimeen	50	1.8	24
Kootenay/Boundary	47	1.8	17
Thompson Country	33	1.5	24
Cariboo/Chilcotin	50	1.4	16
Yellowhead	48	1.9	31
Peace River/Alaska Hwy	35	2.5	14
B.C. Rockies	43	4.1	16

Those who travelled both in British Columbia and to other destinations in the last year tended to take the greatest number of trips and spent almost three weeks travelling last year. Those who travelled exclusively in B.C. spent less than two weeks travelling last year and those who travelled exclusively out of the Province took the fewest holidays, but spent the longest time away from home, per trip.

	Only Travelled in B.C. Last Year	Travelled in B.C. and Other Destinations Last Year	Only Travelled Out of B.C. Last Year
Average Number of Trips Taken per Household	1.8	3.3	1.5
Average Number of People Travelling Together per Trip	2.9	2.8	2.6
Average Number of Nights Spent Away from Home per Trip	5.9	7.1	14.6

Planning Patterns

The most typical planning period for a trip within B.C. was twelve days. Trips within B.C. are significantly more likely to be spontaneous than are trips to other destinations. The further the destination the longer the planning period.

	Final Trip Destination				
	British Columbia	Other Canada	U.S.A.	Sun Spots	Other*
Total Number of Responses	1865	618	385	296	96
Time Spent Planning	%	%	%	%	%
Less Than 1 Day	20	8	11	9	6
2 - 3 Days	11	8	12	12	10
4 - 5 Days	2	1	1	1	3
6 - 14 Days	28	31	36	24	19
2+ Weeks to 1 Month	18	20	16	18	18
4+ Weeks to 4 Months	14	23	14	20	21
4+ Months or More	6	8	9	16	23
Average	12 days	15 days	13 days	16 days	25 days

* "Other" destinations include Australia, New Zealand, the Orient, Britain and Europe.

Method of Travel

Overall, most travel was completed by automobile. Seven out of ten respondents who travelled in B.C. used an automobile as their major method of travel. Those travelling to sun spots and "other" destinations were significantly more likely to use air travel. Also, those travelling to "other" destinations were significantly more likely to use a motor home or camper. The use of airplanes is probably determined by the distance travelled and time available to reach the destination.

	Final Trip Destination				
	British Columbia	Other Canada	U.S.A.	Sun Spots	Other*
Total Number of Responses	1866	617	384	295	98
Mode of Travel	%	%	%	%	%
Car/Truck	70	58	66	48	31
Plane	15	28	16	41	51
Bus	2	4	2	3	-
Ferry	1	1	2	1	-
Motor Home/Camper	8	8	9	4	14
Boat/Ship	2	-	5	1	-
Other	2	1	-	1	4

* "Other" destinations include Australia, New Zealand, the Orient, Britain and Europe.

Time of Year Travelled

The traditional summer holiday period remains the most popular, however, September and, to a lesser extent October and May, show some strength. (The total will not add to 100% as more than one answer could be given.)

	Travellers
BASE	496
Time of Year Travelled	%
January	8
February	9
March	15
April	18
May	17
June	20
July	36
August	41
September	33
October	20
November	6
December	9

Party Size

The average party size per trip was 2.9 people. There was a slight difference noted in that the average for Vancouver Island was 2.6 persons as compared to an average of 3.2 persons in the Northern Interior. This difference may be attributable to the fact that respondents from the Northern Interior tend to have larger families and are more family orientated than respondents from other areas.

		Residence Area			
	Total Travellers	Vancouver Island	Vancouver and Area	South Eastern B.C.	Northern Interior
Total Number of Responses	1097	185	379	266	267
Number in Travel Party	%	%	%	%	%
One	16	18	22	11	13
Two	37	35	39	33	39
Three	15	16	12	20	12
Four	18	18	13	19	23
Five or More	14	14	13	17	12
Average	2.9	2.6	2.8	3.0	3.2

Reasons for Travelling to Preferred Destinations and Activities Participated In

The primary reason for all travel was visiting friends and relatives. Other reasons given include pleasure/sightseeing, a basic holiday, and outdoor activities.

Outdoor activities are of significantly more importance to those travelling in B.C. and the U.S.A.

Those visiting other parts of Canada do so to visit friends and relatives.

Almost one out of four travellers (24%) went to "sun spots" to visit friends and relatives. Their other motives were pleasure/sightseeing and a basic holiday.

	Final Trip Destination				
	British Columbia	Other Canada	U.S.A.	Sun Spots	Other*
Total Number of Responses	2953	966	596	496	159
Reasons for Choosing the Holiday Destination	%	%	%	%	%
Visit Friends and Relatives	31	41	21	24	26
Good/Warm Weather	3	1	3	9	3
Outdoor Sports/Activities	15	8	13	8	11
Basic Holiday	14	13	16	13	9
Pleasure/Sight Seeing	13	15	13	15	19
Shopping/Night Life	6	7	9	9	3
Tourist Attractions	1	-	6	1	1
On Business	5	5	3	4	5
Personal Reasons	3	3	5	2	4
Not Too Expensive	1	-	1	2	2
Never Been There	2	2	3	6	9
Familiarity	5	5	5	6	6
Other	1	-	3	1	1

* "Other" destinations include Australia, New Zealand, the Orient, Britain and Europe.

The definitions given below apply to the tables describing why a particular trip destination would be selected over others.

Purely Tourism Reasons include:

- "different culture"
- "many things to do"
- "good outdoor sports"
- "tourist attractions"
- "meet new people" and
- "relaxing atmosphere".

General Reasons include:

- "close accessibility"
- "not too expensive"
- "never been there"
- "like it there" and
- "just to get away".

Negative Reasons include:

- "too short a time"
- "don't like to travel" and
- "no money".

Destination of Choice for Future Trips and Why Travel There

Reasons for Choosing Destination	Length of Trip in Days			
	3	7	14	28+
a) British Columbia				
BASE	320	212	64	16
	%	%	%	%
Visiting Friends & Relatives	44	55	38	19
Physical Characteristics of Area	23	28	31	44
Purely Tourism Reasons	55	54	48	56
General Reasons	41	28	34	56
Negative Reasons	1	-	2	6

continued...

Reasons for Choosing Destination	Length of Trip in Days			
	3	7	14	28+
b) Other Canada				
BASE	67	87	87	67
	%	%	%	%
Visiting Friends & Relatives	64	74	74	54
Physical Characteristics of Area	-	15	14	16
Purely Tourism Reasons	52	32	18	19
General Reasons	37	25	33	49
Negative Reasons	-	1	-	-
c) U.S.A.				
BASE	80	62	58	32
	%	%	%	%
Visiting Friends & Relatives	18	21	26	25
Physical Characteristics of Area	18	57	40	44
Purely Tourism Reasons	75	55	45	41
General Reasons	44	31	47	41
d) Sun Spots				
BASE	64	196	264	115
	%	%	%	%
Visiting Friends & Relatives	9	6	6	5
Physical Characteristics of Area	20	60	86	78
Purely Tourism Reasons	77	69	49	54
General Reasons	52	47	52	50

Frequency of Travel

Over 75 percent of British Columbians have taken a pleasure trip within the Province last year. These can be considered the total potential market for intra-Provincial travel. Of those sampled 53 percent travelled in B.C., and 52 percent have travelled to other destinations. Of those who have travelled for pleasure in the last year (78 percent of total population) 33 percent only travelled in B.C.

Travel Patterns of B.C. Residents

BASE	634
	%
Did Not Travel in Last Year	22
Travelled Only in B.C. in Last Year	26
Travelled in B.C. and Out of B.C. in Last Year	27
Only Travelled Out of B.C. in Last Year	25

Length of Vacations, Trips, and Holidays

The duration of trips within the Province is the shortest, but is very similar to the length of trips to the U.S.A. Extended vacations in the U.S.A. are rare unless the final destination is a "Sun Spot".

	Final Trip Destination				
	British Columbia	Other Canada	U.S.A.	Sun Spots	Other*
Total Number of Responses	1872	620	388	340	98
	%	%	%	%	%
Number of Nights Spent at Destination					
One	3	4	6	1	-
Two	31	17	28	15	19
Three	19	15	15	13	7
Four	10	11	11	9	4
Five	6	8	5	4	5
Six	4	4	2	3	5
One Week	9	10	12	9	2
Eight or More Days	18	31	21	46	58
Average	3 days	4 days	3 days	1 week	more than 1 week

* "Other" destinations include Australia, New Zealand, the Orient, Britain and Europe.

Information and Influence Sources

The majority of travellers indicated they didn't need any information before they went on their trip. This is especially true of those who vacationed in B.C. where 62 percent indicated they didn't need any planning information. As was discovered in the focus groups, B.C. is a "known" destination, therefore no planning information is deemed necessary.

	Final Trip Destination				
	British Columbia	Other Canada	U.S.A.	Sun Spots	Other*
Total Number of Responses	1909	641	401	312	103
Information Sources for Trip	%	%	%	%	%
Friends and Relatives	23	27	31	22	22
Travel Agent	4	7	4	17	16
Brochures/Pamphlets	3	2	5	4	8
Tourism Information	2	3	5	2	-
T.V./Paper/Advertisements	2	3	5	4	2
Specific Group/Club	2	3	7	2	1
Other	2	1	1	1	1
Didn't Need Any	62	53	43	48	50

The majority of travellers going to any area, except the U.S.A., indicated they themselves were most responsible for choosing their holiday destination. Those who travelled to the U.S.A. were significantly more likely to be influenced in their choice by friends and relatives.

	Final Trip Destination				
	British Columbia	Other Canada	U.S.A.	Sun Spots	Other*
Total Number of Responses	1865	618	388	295	98
Most Responsible Person for Choosing the Destination	%	%	%	%	%
Self	52	58	47	54	53
Spouse	17	16	17	14	12
Parent	2	2	2	2	4
Child	1	2	2	1	1
Other	2	1	1	1	2
Spouse and Self	13	11	8	13	15
Friends and Relatives	12	9	21	15	10
Whole Family	2	1	2	1	2

* "Other" destinations include Australia, New Zealand, the Orient, Britain and Europe.

Objective Two: General attitudes towards travel within and outside of British Columbia.

Reasons for Travelling/Not Travelling Within the Province

The major reason for travelling in B.C. was surprising! Although scenery and beauty were important considerations, the major motivation for people to consider travelling within the Province was their feeling that they should support their own Province. This overall feeling was based on an amalgam of pride in their Province, the convenience, the reduced cost, and a feeling that they could know more about the Province.

Major Reasons for Travelling Within British Columbia

1.	To See B.C./Our Province/Keep Money in B.C.	(63%)
2.	Beautiful Scenery/Coastal Areas	(48%)
3.	Visiting Friends and Relatives	(45%)
4.	Inexpensive/Cheaper to Travel	(38%)
5.	Close to Home/Not Far to Go/Accessibility	(33%)

The major reasons for not travelling within the Province revolved around both controllable and uncontrollable variables. The uncontrollable factors included the weather, the long distances needed to be travelled over, and treacherous highways. There was a strong opinion that B.C. does not offer holiday destinations that have the excitement associated with out-of-Province or out-of-country resort areas. This opinion was strongest in the urban areas. Urban respondents, as compared to rural respondents, indicated that outdoor activities are less enjoyable.

Major Reasons for Not Travelling Within British Columbia

1.	Not Exciting/Not for Me/Prefer Other Places	(42%)
2.	Poor Weather/Cold	(36%)
3.	Travel/Gasoline/Generally Expensive	(21%)
4.	Dislike Winding Roads/Dangerous Highways	(19%)
5.	Nothing New/Familiar With/Have Seen Before	(18%)

Interest In and Attractions for Travelling Intra-Provincially

The respondents were very likely to consider traveliing in B.C. for a short three day trip, but B.C. lost its appeal as the trip length increased. The conclusion is that most B.C. trips are made by car, are relatively short in duration, and do not cover long distances.

	Length of Trip in Days			
	3	7	14	28+
Location Chosen	%	%	%	%
British Columbia	53	35	11	3
Other Canada	11	14	15	12
U.S.A.	13	10	10	6
Sun Spots	11	32	45	20
Other	1	2	15	56
Nowhere	11	5	4	3

Hence, the overall conclusion is that intra-Provincial tourism would be best served by providing opportunities for short holidays that take people out of their home environment inexpensively.

The major attractions for travelling within the Province include the following:

- Nice Scenery/Beautiful B.C.
- Close to Home
- Good for Camping/Fishing/Outdoor Activities
- Our Province/Familiar/Keep Money in B.C.
- Lots of Things to Do

Objective Three: To determine preferences and needs in vacations - The Perfect Holiday.

Vacation Needs

The majority of respondents (57 percent) did not consider a two day trip to be a holiday. A two day trip is too short a time for them to achieve their goal of relaxation.

	Is a Two Day Trip a Holiday
	No
BASE	359
	%
Why Not	
It is Just Getting Away	1
It's too Short a Time	92
Driving Takes Time	9
Other Reasons	1

When British Columbians decide to take a holiday the single most important factor is to be together as a family. Of somewhat less importance is visiting new destinations, and just getting away from the demands of home.

BASE	627
	%
Most Important Factors When Deciding to Take a Trip	
To be together as a family.	38
Going to places where I have never been before.	13
Just to get away from demands at home for awhile.	12
To have fun and be entertained.	6
To enjoy the outdoors.	6
To try new and different experiences and life-styles.	6
To learn about another country's way of life.	5
To travel to places where I feel secure.	4
To lie in the sun and relax.	4
To participate in favourite sports and activities.	2
Other Reasons	4

Objective Four: To measure the penetration of the British Columbia residents' total travel revenues by intra-Provincial vacationing, and to estimate the total potential penetration that could be achieved.

Market Penetration

At the time of the survey the population of B.C. was estimated, by the 1983 up-date to Statistics Canada's 1981 census, to be 2,805,400. Fifty-three percent of the population travelled within B.C. last year. The following figures have been computed for the potential intra-Provincial travel market.

		Number of People
Travellers - Total Potential	100%	2,805,400
Travelled in B.C. in Last Year	53%	1,486,862
Did Not Travel in Last Year	22%	617,188
Only Travelled Out of B.C. in Last Year	25%	701,350

During 1983-1984 forty-seven percent of British Columbians did not travel within their Province. Thus, the potential market that could be encouraged to change their habits and vacation in B.C. is 1.3 million people.

Objective Five: To identify those market segments that are most amenable to travelling within British Columbia, and the support needed to attract these segments.

Geographic Characteristics

The results of the survey have been analyzed according to the respondents residence location with specific differences being noted.

The major market is the Lower Mainland, which differs from the remainder of the Province as follows:

- Greater incidence of single people (34% compared to Provincial average of 24%). If the Lower Mainland data is removed the incidence of single people declines to 18%.
- Smaller household sizes (1.9 vs. 2.9 average for the remainder of the Province).
- Fewer children under 18 (0.8 vs. 1.0 for the Province).
- Higher level of education (28% completed university compared to the Provincial average of 20%).
- A somewhat higher income on average ($28,500 vs. $28,000 for the Province).
- Greater incidence of residents renting their homes (45% vs. 29% for the Provincial average).

The other areas do not exhibit such large variances, however, the Northern Interior respondents did have larger families and were more likely to have blue collar jobs.

This major market segment, the Lower Mainland, enjoys travel, but beautiful scenery and the great outdoors are unlikely to motivate them to travel within the Province. What is needed are inducements such as discounts in accommodation at Whistler Village, packaged ski holidays to the interior of the Province, special rates for trips to Vancouver Island, and lower air fares to other parts of the Province. Because they view Vancouver as the major tourist attraction in B.C., more has to be done to promote travel outside the Lower Mainland. This market wants to get away from home and relax but not spend eight hours getting to their destination. This is why destinations such as Whistler Village and Vancouver Island, which are not too far from home, may be the areas to promote to this group.

Life Cycles

Additional information was gathered by segmenting the population by age, marital status, and the presence of children under 18 years of age at home. The results are presented in this section.

TRAVEL PATTERNS Life Cycle	Average # Trips Taken in the Past Year	Proportion Not Travelling
		%
Single/No Children	2.3	17
Single/With Children	2.1	20
18 - 34/Married/No Children	2.3	13
35 - 54/Married/No Children	1.8	20
55+/Married/No Children	2.0	29
18 - 34/Married/With Children	1.7	31
35+/Married/With Children	2.3	22

As might be expected, age and the presence of children in the home tend to inhibit people from travelling.

INTRA-PROVINCIAL TRAVEL Life Cycle	Travelled Within B.C. in the Past Year
	%
Single/No Children	54
Single/With Children	56
18 - 34/Married/No Children	52
35+/Married/No Children	42
18 - 34/Married/With Children	62
35+/Married/With Children	60

Married people with children are more likely to travel within the Province, while older couples with no children are least likely to travel intra-Provincially.

Packaged holidays in B.C. would appeal to younger individuals with or without children. They would like to see improvements made in the level of service at government camp sites, reduced costs of accommodation (as would people in all stages of their life style), and improvements in the availability of information on travel within the Province.

People 18 - 34 with children would be very interested in activities for their children.

Younger people without children were more likely to travel to the Okanagan and out of the Province to California and Washington, while older people without children were more likely to be travelling to Vancouver Island, Vancouver, the Cariboo, and destinations outside of B.C. Younger couples with children travelled throughout the Province.

Psychographic Characteristics

The statistical analysis of the results of a series of psychographic questions indicated there were five basic groups of people in the sample who could be distinguished by their attitudinal positions.

To provide a general overview of each cluster they have been given representational names as follows:

Cluster A: Mark and Karen (19% of the population)
Younger, blue collar, less educated, rural, lower income, single, home renters. They travel in British Columbia.

Cluster B: David and Sarah (29% of the population)
Younger, white collar, professional, highly educated, urban dwellers, single, renters, both male and female (Yuppies). They travel in and out of British Columbia.

Cluster C: Jim and "The Wife" (16% of the population)
Older, blue collar, less educated, rural, lower-middle income, married, home owners, both male and female, some have children. They travel only in British Columbia or only out of British Columbia.

Cluster D: Aunt Pat and Uncle Al (18% of the population)
Medium age, blue and white collar, urban and rural, married, have children, home owners, more likely female. They don't like to travel.

Cluster E: Alice and Fred (18% of the population)
Older, blue collar, rural, married, home owners, lower income, have children, more likely female. They don't travel or only travel in British Columbia.

Outlook Towards Life

Mark and Karen - These people tend to be impulsive, averse to the use of credit, and they feel as if they're never getting ahead. They don't plan their holidays, they aren't very interested in community affairs, and foreign travel is not one of their favourite activities. Mark and Karen are unsure about whether or not they will be better off financially next year.

David and Sarah - This group of archetypical "YUPPIES" are confident in themselves, interested in world events, and enjoy foreign travel. They plan ahead for major purchases, don't believe advertising is true, and aren't too concerned with what's happening in their neighbourhood. David and Sarah are quite certain they will have more money to spend in the coming year.

Jim and "The Wife" - These couples stay at home, their family is very important, and they describe themselves as old fashioned. One thing they don't do is buy on impulse and they are non-users of credit. They are unlikely to be the first one on the block to try something new. Although Jim and "The Wife" are the ones most likely to travel to places like Las Vegas, they don't enjoy foreign travel. They probably view the U.S. as being much the same as Canada, not a foreign country. They also don't believe very strongly that women should work outside the home. Their financial future is uncertain in the coming year.

Aunt Pat and Uncle Al - Credit card companies will have a hard time convincing Aunt Pat and Uncle Al to pay with anything but cash. Their family is important and they describe themselves as never getting ahead and as being traditional. They plan ahead for their purchases, as they do with their holidays, and are not impulsive. Aunt Pat and Uncle As don't believe they will be any better off financially in the coming year.

Alice and Fred - Their family is very important, and they are non-users of credit. Alice and Fred stay at home, and they prefer using known products. These couples are not extravagant nor do they buy on impulse. Foreign travel and adventurous holidays don't appeal to these individuals. Alice and Fred are uncertain as to whether or not they will have more money to spend next year.

DEMOGRAPHIC PROFILE

A demographic profile is shown, along with several tables from the report, to give a more complete description of each of the clusters.

	Total Sample	Clusters: Mark and Karen	Sarah and David	Jim and "The Wife"	Aunt Pat and Uncle Al	Alice and Fred
BASE	606	113	176	97	108	111
	%	%	%	%	%	%
Residence:						
Vancouver Island	16	12	19	14	17	16
Lower Mainland	36	35	**49**	27	34	28
South Eastern BC	22	**26**	15	**26**	21	**26**
Northern Interior	26	**27**	18	**33**	28	**30**
Average Age:	35	29	32	**40**	37	**41**
Marital Status:						
Single	24	**44**	**36**	12	7	6
Married	65	47	50	**71**	**72**	**84**
Sep./Divorced	7	4	10	9	**13**	5
Widowed	4	2	3	7	6	5
Other	1	3	1	-	1	-
Occupation:						
White Collar	32	28	**43**	24	27	26
Blue Collar	36	**52**	33	34	34	31
Unemployed	4	6	4	2	3	3
Retired	11	5	9	**19**	15	**16**
Housewife	17	9	11	21	21	**24**
Completed University:	20	16	**39**	17	16	13
Home Ownership:						
Own	71	58	59	77	83	83
Rent	29	**42**	**41**	23	17	17
Average Household Income: (000's)	$28	$25	**$31**	$29.5	$28	$25
Sex:						
Male	47	50	51	**55**	37	36
Female	53	50	49	45	**63**	**64**

Travel Patterns

	Clusters				
	Mark and Karen	Sarah and David	Jim and "The Wife"	Aunt Pat and Uncle Al	Alice and Fred
BASE	113	177	97	108	111
	%	%	%	%	%
Did Not Travel in Last Year	19	18	19	**29**	**25**
Travelled Only in B.C. in Last Year	**27**	22	**30**	22	**28**
Travelled in B.C. and Out of B.C. in Last Year	**30**	**35**	20	22	23
Only Travelled Out of B.C. in Last Year	23	25	**31**	27	23

Comments: Aunt Pat and Uncle Al are significantly more likely to be non-travellers and are least likely to travel intra-Provincially. At least one out of two people in each of the other groups did some travelling within B.C. last year.

Is a Two-Day Weekend Trip a Holiday

	Clusters				
	Mark and Karen	Sarah and David	Jim and "The Wife"	Aunt Pat and Uncle Al	Alice and Fred
BASE	113	176	97	108	111
	%	%	%	%	%
Yes	43	44	36	40	47
No	57	56	64	60	53

Comments: Jim and "The Wife" and Aunt Pat and Uncle Al are least likely to believe getting away for two days is a holiday, whereas Alice and Fred are somewhat more likely to agree that getting away for two days is a holiday.

Several of the Major Reasons Given for Travelling within B.C.

	Clusters				
	Mark and Karen	Sarah and David	Jim and "The Wife"	Aunt Pat and Uncle Al	Alice and Fred
BASE	113	177	97	108	111
	%	%	%	%	%
To See B.C./Keep the Money in B.C./Our Province	31	20	27	26	28
Beautiful Scenery/Coast	18	20	17	14	15
Inexpensive/Cheaper to Travel	15	19	10	17	9
Visiting Friends & Relatives	15	15	19	20	17
Outdoor Activities/Camping	10	6	12	5	9

Several of the Major Reasons Given for Not Travelling within B.C.

	Clusters				
	Mark and Karen	Sarah and David	Jim and "The Wife"	Aunt Pat and Uncle Al	Alice and Fred
BASE	113	177	97	108	111
	%	%	%	%	%
Not Exciting/Not for Me/ Prefer Other Places	26	22	13	18	14
Poor Weather/Cold	23	21	8	13	12
Nothing New/Familiar With/ Have Seen Before	8	10	10	7	7

Activities Pursued

Activities Participated In	Clusters				
	Mark and Karen	Sarah and David	Jim and "The Wife"	Aunt Pat and Uncle Al	Alice and Fred
BASE	113	177	97	108	111
	%	%	%	%	%
Hiking	**62**	**64**	41	**51**	42
Scuba Diving	8	5	3	3	1
Lake or Stream Fishing	**57**	**49**	**50**	**50**	**50**
Salt Water Fishing	22	36	22	26	19
Visiting a Museum	**70**	**75**	**68**	**66**	**69**
Hunting	24	12	19	22	21
Cross-Country Skiing	22	24	19	19	14
Downhill Skiing	**42**	**36**	17	15	12

Comments: Fresh water fishing and visiting a museum were common activities amongst all the groups. The two younger groups, Mark and Karen and Sarah and David, were those most likely to be hikers, as were Aunt Pat and Uncle Al. Those most likely to engage in any form of skiing were the younger people in the first two groups.

The most important factors used when deciding to take a trip were as follows:

Mark and Karen - To go to new places, to enjoy the outdoors, have fun and be entertained.

Sarah and David - To go to new places, to learn about another country's way of life and to try new and different experiences and life-styles.

Jim and "The Wife" - To be together as a family, to go to new places, have fun and be entertained.

Aunt Pat and Uncle Al - To go to new places, to be together as a family, have fun and be entertained.

Alice and Fred - To be together as a family, to go to new places and to enjoy the outdoors.

Camping Profile

Number of Times Camped in B.C. in the Past Year	Clusters				
	Mark and Karen	Sarah and David	Jim and "The Wife"	Aunt Pat and Uncle Al	Alice and Fred
BASE	113	177	97	108	105
	%	%	%	%	%
Zero	28	40	42	45	48
Once	3	7	5	3	10
Twice	10	12	9	6	6
Three or More Times	54	42	43	45	36

Comments: This table indicates that Mark and Karen tend to be avid campers, while Alice and Fred tend to be non-campers. All the other segments are split almost evenly between non-campers and avid campers. Overall, the results indicate that more than 50 percent of respondents in all groups camped in the last year. Camping seems to be an activity engaged in by a cross-section of British Columbians from all age groups and all walks of life.

Additional Objectives

Camper Profile

More than one out of every two (54%) British Columbians surveyed made use of a government camp site in the past year. Of those who camped more than once in the past year, 63 percent used government sites for all their camping trips.

British Columbians who participated in the survey indicated they were likely to travel more intra-Provincially if the quality of government camping facilities were improved and if the number of government camp sites were increased.

Facilities and services that could be offered at government camp sites and are important to most people are hot and cold showers, flush toilets, and security supervisors.

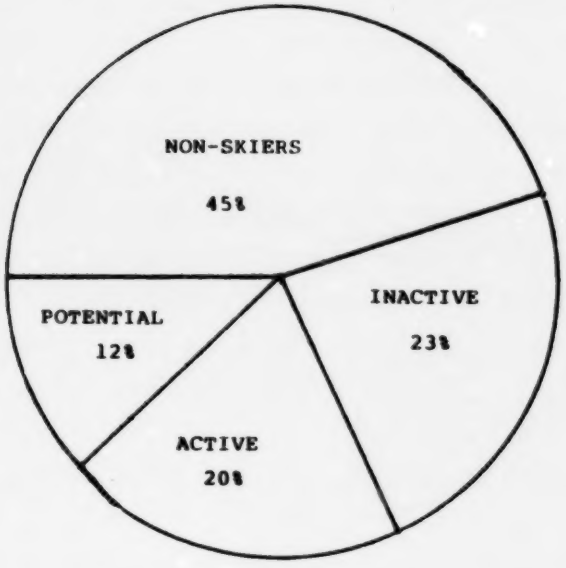
The major advantages cited for government campsites versus private sites were as follows:

- Government sites are cleaner.
- Government sites are more peaceful.
- Government sites are cheaper.
- Government sites are in more locations.
- Government sites are more natural/less commercialized.

Skier Profile

CROSS-COUNTRY SKIING

Population Profile



Those most likely to cross-country ski are found in Cluster A (Mark & Karen, the young, blue collar, off the road campers) and Cluster B (Sarah & David, the professional city slickers who have seen the world but can get back to nature).

Number of Times Cross-Country Skied in the Past Year

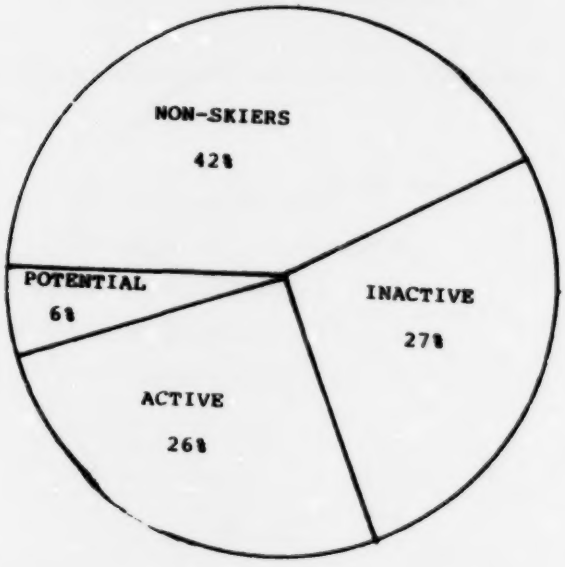
BASE	125
	%
Once	8
Twice	13
Three Times	12
Four Times	10
Five Times	5
Six Times	13
Seven or More Times	39
Average	11 times

Major Reasons for Not Cross-Country Skiing in the Past Year

- Lack of Time (30%)
- Change of Life Style (18%)
- No Equipment (15%)
- Physically Unable (14%)

DOWNHILL SKIING

Population Profile



Cluster A individuals (Mark & Karen, the young, blue collar, off the road campers) and Cluster B (Sarah & David, the professional city slickers who have seen the world but can get back to nature) are those most likely to be active downhill skiers.

Number of Times Downhill Skied in the Past Year

BASE	160
	%
Once	12
Twice	10
Three Times	7
Four Times	9
Five Times	8
Six Times	9
Seven or More Times	45
Average	12 times

Major Reasons for Not Downhill Skiing in the Past Year

- No Interest (30%)
- Too Expensive (29%)
- Lack of Time (20%)
- Physically Unable (18%)

VI MARKETING CONSIDERATIONS AND RECOMMENDATIONS

1. The respondents thought they are generally aware of options available to them for vacationing in B.C. for they travelled extensively in the Province as children with their parents. B.C. has an image, in their minds, of being beautiful but lacking excitement. They have an inner pride about their Province and consider that its various sectors are definitely different. The majority's complacency, however, removes B.C. from any thought of a holiday of over three days. This complacency also has dulled their awareness of the vacation alternatives available here. To counter-act this lack of awareness, and to raise British Columbians consciousness about B.C. as a possible holiday choice, the following steps are recommended:

   - Emphasize that B.C. has interesting or new activites in addition to being "Super Natural".

   - Appeal to their sense of pride in the Province and their stated position that travelling in B.C. is morally positive.

   - Increase available information on intra-Provincial travel, for example: a concerted, planned, scheduled series of newspaper articles on resorts and attractions throughout the Province. This will encourage the word-of-mouth network, the most effective communication system available. Promotional type advertising is probably less likely to be noted and retained and does not provide sufficient detail.

2. The vacation alternatives in B.C. are viewed as being passive rather than active, especially by those who vacation out of the Province. Sightseeing does not involve a person to the same extent as does visiting Disneyland or lying on a beach and swimming. The Province has been portrayed as providing solitude, getting away by oneself. Most people are not loners - they need others with which to find enjoyment. There is indeed a segment of the population who require this type of solitary holiday but it is a minority. It is also doubtful if they can be influenced by promotion for their needs are quite specific. The mass market requires quasi-interactive pursuits -watching the action! They participate both vicariously and personally. An orientation from the "finer things in life" approach to exciting, involving options that everybody can enjoy would attract a larger market.

3. Trips within the Province are, by the survey respondent's definition, of shorter duration. They are not a holiday because the participant does not relax enough to feel a sense of being away from their everyday lives.

One alternative is to develop this type of short-break which offers instant relaxation or dislocation from their normal environment and could be aimed specifically at the urban residents.

The second alternative is for the tourism industry to develop packaged holidays that are four or five days in length. These should not be rigidly structured but flexible for the majority of travellers feel too confident to buy a pre-packaged holiday in "their **own** Province" (This confidence is less if they are visiting foreign destinations of course.).

If the duration of their holiday can be extended the economic benefits are obvious. A more subtle change would be increasing the residents' perception of the Province as a vacation option.

4. The residents of the various geographic sections of the Province are as diverse as the areas themselves. They not only have different motivations and needs, but demographically the variances are substantial. Hence, one marketing approach cannot effectively cover the whole Province.

The Province can be readily segmented as follows:

- Vancouver Island
- The Lower Mainland
- The Okanagan
- The Southwest
- The North

The residents in each area should be recognized as having specific travel needs and then a marketing plan, including product design, promotion and pricing structures can be developed for their requirements. One important but obvious finding is that proximity to an attraction is a very important criteria for its success. It is difficult to convince people to travel much more than 200 miles or 3 hours from their home for a weekend. This radius should be considered the "Catchment Area" for a population centre, and the resorts, activities, and attractions within this zone should be the centre of a marketing plan for shorter trips. The Lower Mainland, due to the size and diversity of its population, could be approached with several sub-marketing plans. The major problem in this area is the accessibility and attraction of the U.S.A., in comparison to the rest of the Province. These urban residents will be more difficult to convince that travel in B.C. can be a worthwhile experience for their opinions and psychographic profiles predicate against this. Special one-day driving tours, two-day over-nighters, and three or more day flexible air or auto packages could be developed to attract this market to the Gulf Islands, Vancouver Island, Whistler, or the Okanagan. Care must be taken to offer activities that appeal to an urban life-style, for example wine-tasting courses or special hide-aways with good food and a convivial atmosphere at a reasonable price.

5. Longer trips, as stated earlier, could be packaged, especially if air travel and accommodation can be bundled into a reasonably priced unit. The air component is essential! To access the various segments of our Province can take over twelve hours driving. This is considered expensive, tedious, dangerous, and contributes to the lack of attraction for holidays within the Province. Air travel is speedy and comfortable but at present expensive. It has, however, an elastic demand (see the load factors on the Vancouver-Okanagan routing when the price dropped to $55 round trip). The emphasis on a shorter automobile trip (as mentioned in point 4 above) can also affect B.C. residents' propensity to accept intra-Provincial tourism as a viable alternative to leaving British Columbia.

6. Accommodation is perceived as expensive by some B.C. residents. Although the "Bed and Breakfast" concept is far from accepted, variants on this theme could be fostered. Several references to inexpensive motel chains in the project received positive endorsement. B.C. is not perceived to have this type of accommodation available.

   A concerted effort by the tourism industry to provide intra-Province products that appeal to the more budget conscious, in conjunction with the present facilities and services, could help the Province compete with the United States as a vacation option.

7. Since much of the resident travel within the Province is rubber-tire, specific products should be developed to attract them to specific zones. As people are normally attracted to automobile travel for the flexibility it offers, special routings could be developed that provide chains of attractions. An example would be the radio commercial that covered the Vancouver to Pemberton corridor (Sea to Sky Highway) or a routing through the Kootenays that includes Fort Steele, Trail, Kimberley, Nelson, and the Arrow Lakes area. The directions would include hotels, motels, campgrounds, sightseeing, and other more general information that could cause people to want to concentrate their travel in one area and perhaps extend their trip for one or two nights longer.

8. The tourism physical plant is highly concentrated on the West Coast of the Province. Encouragement and support for all-season tourist attractions and resorts that provide various attractions for various levels of the tourist market would "spread the wealth". These need not be lavish Whistler type centres, but "themed areas" or such territorial concepts as described in #7.